HRS Coordinators

October 23, 2014
1 – 2:30 p.m.
Room 1106/1108, 21 N. Park
Agenda

- UW Service Center Website
- Benefits Update
  - TSAs
  - TASC
  - Same-Sex Marriages
  - Wellness Taxation
- Missed Payroll Requests
- Payrolling Nonresident Aliens
- Separation of Duties
- Funding Issues Related to Calendar Year End
- Miscellaneous
  - Payroll Internal Audit
  - UC Calculation
  - October/November Payroll Calendars
  - Next Meetings
HRS Administration

Good morning, Ethan!

Today
- 10B 4th Batch Prelim Calc
- 10B FICA Deadline

Annual Benefit Enrollment Period Oct 6–31

What’s Happening Right Now

Operations Journal  UWSC Communications  Presentations Library

- FYI: HRS Reporting - EPM Data Warehouse View Refresh in progress and expected to finish around NOON
- 10B FICA Deadline
- 10B 4th Batch Prelim Calc

Functional Areas
- Benefits
- Finance
- Human Resources
- Payroll
- Project Management Office
- Security
- Talent Acquisition Manager
- Time and Absence

UWSC Internal Resources
- Internal Resources Home
# Operations Journal

To set custom defaults, please visit the Web Preferences tab of your directory profile page. Selections made on this page will not affect your defaults.

**Functional Areas**
- Benefits
- Finance
- HR
- Payroll
- Project Management
- Reconciliation
- Reporting
- Security
- TAM
- Technical

**Types**
- Communications
- KB
- Meetings
- My UW
- Processing
- Web Updates

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Event Description</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct 22</td>
<td>10:16</td>
<td>FYI: HRS Reporting - EPM Data Warehouse View Refresh in progress and expected to finish around NOON</td>
<td>Comm</td>
</tr>
<tr>
<td>Oct 22</td>
<td></td>
<td>10B 4th Batch Prelim Calc</td>
<td>Payroll</td>
</tr>
<tr>
<td>Oct 22</td>
<td></td>
<td>10B FICA Deadline</td>
<td>Morning</td>
</tr>
<tr>
<td>Oct 21</td>
<td>12:00</td>
<td>UWSA Video Conference begins now</td>
<td>Meeting</td>
</tr>
<tr>
<td>Date</td>
<td>Event Title</td>
<td>Slides</td>
<td></td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------------------------------------</td>
<td>--------</td>
<td></td>
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<tr>
<td>October 16, 2014</td>
<td>UWSC HRS Workshop - Annual Benefits Enrollment (ABE) Part II</td>
<td></td>
<td></td>
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<tr>
<td>September 30, 2014</td>
<td>UWSA/UWSC Hot Topics Web Conference</td>
<td></td>
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<tr>
<td>September 26, 2014</td>
<td>Annual Benefit Enrollment HRS Training</td>
<td></td>
<td></td>
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<tr>
<td>September 25, 2014</td>
<td>UW-Madison HRS Coordinators Meeting</td>
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</table>

**UWSC HRS Workshop - Annual Benefits Enrollment (ABE) Part II**
- UWSC Benefits
  - Annual Benefits Enrollment Period: Campus Assistance
- UWSC Physical Move
- UW Service Website

**UWSA/UWSC Hot Topics Web Conference**
- UWSC Benefits
- Annual Benefits Enrollment Period: Campus Assistance
- UWSC Physical Move
- UW Service Website

**Annual Benefit Enrollment HRS Training**
- This session will focus on event maintenance for the Annual Benefit Enrollment (ABE) period.

**UW-Madison HRS Coordinators Meeting**
- Cherwell Tickets
- JEMS Load and Benefits Batch
- Benefits Update
  - Consultation Chart (handout)
  - Open Enrollment and Benefits Fair
  - 2015 Benefits Changes
  - Revised Benefits Application Forms
  - HRS Security Role Changes
  - Payroll Nonresident Aliens
  - Payroll Payline Credentialing
  - Miscellaneous
  - Tuesday Check-Ins
  - Hardcopy Earning Statements Update
# Professional Overview

## Skills

<table>
<thead>
<tr>
<th>Skill</th>
<th>Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adobe Dreamweaver</td>
<td>Some Experience</td>
</tr>
<tr>
<td>Blackboard Collaborate</td>
<td>Proficient</td>
</tr>
<tr>
<td>Interactive Reporting</td>
<td>Some Experience</td>
</tr>
<tr>
<td>Microsoft Excel</td>
<td>Proficient</td>
</tr>
<tr>
<td>Microsoft PowerPoint</td>
<td>Proficient</td>
</tr>
<tr>
<td>Microsoft Visio</td>
<td>Proficient</td>
</tr>
<tr>
<td>Microsoft Word</td>
<td>Proficient</td>
</tr>
<tr>
<td>Query Library</td>
<td>Some Experience</td>
</tr>
</tbody>
</table>

## Current Projects

No projects indicated.

## Experiences

### Job-Related Experiences (Conferences, Workshops, etc.):  
- Presenter – Alliance 2014
- Presenter – MidHEUG 2013

### Certificates, Credentials or Other Acknowledgements Earned:  
- Lean Six Sigma - Yellow Belt (Wisconsin School of Business Center for Professional and Executive Development)

### Involvement in Professional Organizations, Committees or Groups:  
- Member of Campus Communicators, UW-Madison
Security Roles

According to our records, you have the following security roles. The data below reflects what is currently in HRS. For helpful security role resources, visit the Security page. Note: Your security roles are only viewable to you.

Sort by Functional Area: All ▼ Submit

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Functional Area</th>
<th>Role Description</th>
</tr>
</thead>
</table>
| AM Department Coordinator  | Absence Management                                   | Approve, Deny, Correct absence entry  
View employee level AM data  
- Review Employee Balance.  
- Add/Correction access for Absence Events.  
- View Entitlement Overrides and Balance Adjustments  
- Create/Adjust Absence Triggers.  
- Define Absence Calendar Group.  
- View Absence Calc Processing Results. |
| AM Employee                | Absence Management                                   | Employee Self Service and earning statement  
Request Absences, View Balances, View Absence history |
| EPM AM Query All Non Sensitive | Absence Management, EPM/Query Library/Reporting | This role contains query access to all Absence Management data views including absence events, overrides, accumulators, calc results and balances.  
This role contains access to the following data views:  
- AM: AM_ABSEVT, AM_ABSEVT_Event Type, Absence Event Definition Data View |
Below is your professional development transcript, a record of the events you have registered for and/or attended. Visit the Administrator Training page to view the training calendar, watch tutorials and listen to recorded sessions.

<table>
<thead>
<tr>
<th>Date</th>
<th>Course</th>
<th>Registered</th>
<th>Attended</th>
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</thead>
<tbody>
<tr>
<td>06/26/2014</td>
<td>Introduction to HRS</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>07/21/2014</td>
<td>Introduction to Cherwell</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
Cheers

Gareth Green

HRS Cheers

Below are cheers of encouragement sent to you from other HRS users. These messages are available for everyone to view. If you would like to hide a message from being publicly viewable, click the 'Hide' link that appears on the message you want to hide.

You can send cheers to employees by visiting the Directories page.

You Rock!
Thanks for facilitating the HRS workshop last week while I was out of the office!
Sheryl Frank, 08/19/2014

Thank You!
Thanks so much for all of your help last week with the Recon Root Causes workshop. I really appreciate all of your help!
Sheryl Frank, 07/21/2014

You Rock!!
Cheers! This is a new directory service that allows you to acknowledge your co-workers good work, send a thank you or a greeting.
UW Service Center Web Team, 06/20/2014
Website Preferences

The UW Service Center website features content that can be customized and personalized by each user. Below, you can specify default preferences for various content areas. Be sure to check back – more options will continue to be added!

### Functional Areas

<table>
<thead>
<tr>
<th></th>
<th>Alerts</th>
<th>Events Calendar</th>
<th>Operations Journal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Finance</td>
<td>☑</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>HR</td>
<td>☑</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Payroll</td>
<td>☑</td>
<td>☑</td>
<td></td>
</tr>
</tbody>
</table>
### Website Preferences

#### Data Types

**Events Calendar**
- [x] Events/Training
- [x] Processing

**Operations Journal**
- [x] KB Updates
- [x] Meetings
- [x] My UW/My UW System News
- [x] Processing Dates
- [ ] Web Updates

#### HRS Administration Page Customizable Images

- The image(s) you upload here will appear on your personalized HRS Administration page.
- The file type should be GIF, JPG, or PNG, and the file size should not exceed 3 MB.
- All images are subject to review. Do not submit anything that infringes on copyright law or is in questionable taste.

**Top Right:** Browse...

**Bottom:** Browse...

[Update Preferences]
The Service Center Web Team welcomes feedback.

Ethan Wagner
ewagner@uwsa.edu
Benefits Update

• TSA changes for 2014 due 11/10/14 at 21 North Park, preferably by fax, for both classified and unclassified
• TSA changes for 2015 due 12/10/14 to Madison Benefits Services
  • Note “2015” on top of TSA forms
  • December monthly pay date 1/2/15
  • December B bi-weekly pay date 1/8/15
• Any questions on the current annual benefits enrollment period that ends 10/31/14 at 4:30 p.m.?
TASC (ERA)

- TASC replaces WageWorks in 2015
- Employee signed up in TASC prior to 10/20/14 OR after 10/21/14, they received confirmation, and therefore completed online process
  - No further action required
- Employee attempted to sign up on 10/20/14 or 10/21/14, did not receive confirmation
  - Employee needs to complete paper form
  - Form needs to be signed and dated prior to 10/31/14 and faxed to Madison Benefits Services
Same-Sex Marriages (Current Interpretation)

- Legally recognized in Wisconsin as of 10/6/14 even if married 6/6/14
- Health insurance benefits can be effective 10/6/14
- Refund of imputed tax between 6/6/14 and 10/6/14 is pending
- Separate enrollment period for same-sex marriage, i.e., 10/15/14 thru 11/14/14; must be signed and dated by 11/14/14 at 4:30 p.m.
Wellness Taxation

- Email sent to all employees
- A file will be received by the Service Center
  - December earning statements
    - Taxable fringe code “X…”
  - W-2
    - Increase in taxable gross
Current Eligibility Criteria

• Student Help – minimum of 5 hours
• Classified & Unclassified Hourly Staff – minimum of 8 hours
• Unclassified – minimum of 10% of regular gross pay
• Individual Items not accepted for MPRs:
  • Overloads, Overtime or Add-ons
  • Additional pay not part of regular gross
  • Termination leave payouts
• Retro Pay
Exceptions:

- Summer Service/Summer Session
- Any other exceptions will require supervisor approval

New eligibility criteria:

- Cannot be older than 2 pay periods for unclassified EEs
- Cannot be older than 4 pay periods for biweekly EEs
Payrolling Nonresident Aliens (NRA)

- NRA Fellows and Scholars (SA1)
  - Developing flow diagram to aid in payroll processing NRA Fellows/Scholars paid on a Lump Sum basis
  - Service Center testing new earnings code for NRAs so fringe is not taken
  - Steps for processing and letter for departments to provide NRAs has been drafted
  - Signup sheet for divisions being routed so meeting can be scheduled to go over the process
Separation of Duties

- Many of our SOD conflicts are the combination of HR roles and Payroll Coordinator (currently 322 individuals)
- Discovered that removing Payroll Coordinator from departments resulted in them being unable to view/enter absences for employees in their department
- Solution is now in production
- Service Center needs to be involved if interested in removing PR Coordinator but need access to absences (send Carla email)
- Also resulted in need for other security roles
Separation of Duties

• Proposed New Roles to Service Center
  – PR Coordinator View Only (query not ideal)
  – Update Timesheet w/o Approval

• Next Steps
  – Divisional Focus Group (need volunteers)
    • Develop options for removing conflicts
      – Review Pages within Security Roles, e.g., HR Administrator, HR Job Data Update, PY Payroll Process
      – Change in workflow
    • Who has Systemwide Access
Each year the Service Center processes a calendar year end payroll (CYE) in late February. This payroll posts to WISDM by approximately March 1.

Examples of items included in the CYE payroll that will result in WISDM accounting entries are:

- Monthly employees off cycle payrolls paid after the 11M final calc date (this year Nov. 24) and before 1/1/2015
- Biweekly employees off cycle payrolls paid after the 12B final calc date (this year Dec. 17) and before 1/1/2015
- Employer share taxable payments and fringes (e.g., taxable ERA, Athletics taxable fringes, taxable meals and reimbursements made on expense accounts, etc.) not previously posted in WISDM
- Other late payroll adjustments
What do I need to know about funding for the CYE payroll?

- RSP and grant accountants, controllers and fiscal representatives have expressed concerns about calendar year end funding issues.
- An off cycle payment made in November/December on expired or expiring funding will not be posted in WISDM for several months. Efforts should be made to include these payments on or before the November monthly or 12B biweekly payrolls.
- Large numbers of CYE related payments can be expected to go to default or suspense funding if funding is not in place. Salary cost transfers are then required, including those for very small amounts (often less than $1.00).
Funding Issues Related to Calendar Year End (CYE) Payroll

• What should I do?
  – Ensure all employees have active, valid funding in place.
  – Ensure valid department level funding is in place for every appointing department, even if salaries are not normally paid. This provides a “stopgap” funding.
  – Ensure fiscal year 2015 funding is in place for any terminated employee who may have transactions processed in the CYE payroll.
  – Watch for updates on CYE funding issues and make recommended funding entries.
  – Share this information with persons in your division responsible for grant management and fiscal issues.
  – Share this information with persons in your division who may have outstanding salary payments that will need to be made by the end of the calendar year.
Miscellaneous

• UW-Madison Payroll Internal Audit
  – Accurate timesheet and leave report
  – Termination of employees and proper removal from the system
  – Adequate documentation for new hires

• Calculation for Unemployment Comp
  – Weekly Amount: multiply monthly salary by .2308
  – Daily Rate: divide weekly amount by the number of days the employee worked (default to a standard five-day work week to compute daily wages)

• Service Center Training
  – Intro to HRS (certification for all HRS end-users)
Next HRS Coordinator Meetings

– Thursday December 11
– Thursday January 8 (2\textsuperscript{nd} Thursdays in 2015)
– Thursday, February 12
– Thursday, March 12
– Thursday, April 9
– Thursday, May 14
– Thursday, June 11